



# Partner Onboarding Guide

We're here to help you thrive as a SmartBiz partner

Let's get started!

Login to Partner Assist

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## Make sure your Partner Assist account is setup

### Set up your co-branded referral link

Send your Partner Success Manager 2 versions of your company logo  
(.png or .svg and min 50px height)

### Invite your team members to sign in

Login to Partner Assist >  
Click Team > Click Invite Team Members

### Upload your payment information for future commissions

Login to Partner Assist >  
Click Settings > Click Payment >  
Click Upload Form W9 and  
Voided Business Check

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## Understand what financial products we can offer your clients

### Review our Partner Page

**Content Available:**  
SmartBiz for Partners  
Lending Options for Small Business Owners

Partner

### Review the Resource Page in Partner Assist

Watch previous webinars  
Watch New Partner Orientation

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## Plan your marketing efforts

### View Partner Marketing Resources

**Content Available:**  
Financial product guides  
Email marketing templates  
Sample social media banners  
About SmartBiz  
SmartBiz logo suite

Partner Marketing Resources

### Reach out to our Partner Team

Discuss marketing strategies including: email campaigns, co-branded referral links, and more

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## Set up a call with your Partner Success Manager

### Introduce yourself and your team

### Learn about partner promotions and updates

### Discuss latest products

Learn about our enhanced SBA processes, line of credit, ERC, and more